

Impact case study (REF3)

Institution: Loughborough University		
Unit of Assessment: C17 – Business and Management		
Title of case study: Improving the Development and Performance of Individuals and Organisations using the Reflective Goal Setting Model		
Period when the underpinning research was undertaken: 2011 to 2020		
Details of staff conducting the underpinning research from the submitting unit:		
Name(s):	Role(s) (e.g. job title):	Period(s) employed by submitting HEI:
Cheryl Travers	Senior Lecturer in Organisational Behaviour	April 1993 to present
Period when the claimed impact occurred: March 2014 to December 2020		
Is this case study continued from a case study submitted in 2014? No		
1. Summary of the impact (indicative maximum 100 words)		
<p>Traditional goal setting has limited effectiveness in the development and utilisation of ‘softer’ yet crucial leadership and interpersonal skills. Research by Dr Cheryl Travers pioneered the Reflective Goal Setting (RGS) model, subsequently used in manager/leader training with 500 senior personnel from eight international and UK organisations since 2014 and in degree courses at two UK universities. Impacts include personal and interpersonal skill development among leaders, undergraduates and graduates; improved safety and cardiac arrest management at Leeds Teaching Hospital NHS Trust; more effective performance management at member organisations of the Building Societies Association; a better safety culture at construction company NMCN; positive goal-directed behaviour change among a group of software developers; and enhanced team performance at pharmaceutical company Eurofins.</p>		
2. Underpinning research (indicative maximum 500 words)		
<p>Leaders’ personal and interpersonal skills are increasingly in demand due to the impact they can have on organisational success and employee performance, motivation and wellbeing. However, development of these skills often falls far short of expectations, with poor transfer of learning post-training.</p> <p>Travers argued that this could be due to difficulties in applying the traditional Goal Setting Theory (GST) of Locke and Latham (1990, 2013) to these important but relatively intangible and hard-to-measure skills, especially in the absence of post-training evaluation and/or feedback. Also, a lack of attention to self-awareness and reflexivity in the design of much leader and manager training limits the success of goal setting with these types of skills.</p> <p>In research at Loughborough, Travers therefore developed the five-stage Reflective Goal Setting (RGS) model. This builds on traditional approaches but uniquely introduces the active ingredients of effective self-awareness activity, the focused and detailed writing out of goals, and extensive ongoing written reflection [R1]. Travers developed an innovative programme of teaching and learning to enhance learners’ skills for effectiveness and wellbeing in leadership, management and learning through RGS. Her accumulated learning from RGS’s use further fed back into the model and strengthened its practical utility.</p> <p>This was recognised by an invitation to contribute to the most recent compilation of international goal setting research by the originators of GST, Edwin Locke and Gary Latham. The resulting chapter [R2] outlined the development and application of the RGS model and</p>		

presented findings from its successful use for the motivation for personal improvement of final-year university undergraduates, showing how RGS built on traditional GST by using self-awareness, visualisation, and extensive reflective writing about goals.

The RGS model developed the understanding of the process of personal development goal setting and achievement. It identified important nuances and subtleties in the way goal setting works for different people moving towards similar goals. Research and development of the model also highlighted the key role that features of RGS can play in academic growth, such as self-awareness/consistent story exploration, writing goals down and reflective diarising [R3].

A key finding from using RGS in practice was the potential generalisability of the process. It creates 'goal setting propensity', which can be applied across a range of contexts and with a wide variety of potential outcomes beyond the initial encounter with the model [R3]. This contradicts traditional approaches, which set goals by using SMART objectives based on GST and emphasise that specific goals lead to specific outcomes.

Interviewed for the March 2018 edition of the British Psychological Society practice journal *OP Matters*, GST creator Edwin Locke said: "I think that the work of Cheryl Travers is very exciting... the idea of writing and the fact that if you write about certain goals you may get benefits, whether or not they are directly tied to one of the goals you wrote down." RGS has continued to develop and is revealing a powerful impact on managers' and leaders' crucial skills [R4]. A book authored by Travers, based on her RGS research, is nearing completion and is due to be published as part of Palgrave Macmillan's Palgrave Pivot series in 2021.

3. References to the research (indicative maximum of six references)

R1 Travers, CJ (2011): 'Unveiling a reflective diary methodology for exploring the lived experiences of stress and coping', *Journal of Vocational Behavior*, volume 79, issue 1, pages 204-216
<https://doi.org/10.1016/j.jvb.2010.11.007>

R2 Travers, CJ (2013): 'Using goal setting theory to promote personal development', in *New Developments in Goal Setting and Task Performance*, Locke, E, and Latham, G (eds), Routledge, pages 603-621
<https://doi.org/10.4324/9780203082744>

R3 Travers, C, Morisano, D, and Locke, EA (2015): 'Self-reflection, growth goals and academic achievement: a qualitative study', *British Journal of Educational Psychology*, volume 85, issue 2, pages 224-241
<https://doi.org/10.1111/bjep.12059>

R4 Travers, C, and Rose, A (2018): 'Using a reflective goal setting model (RGS) for the development of crucial leader soft skills', in *Improving Lives: Personal Goal Setting Boosts Student Performance and Happiness*, Academy of Management symposium, Chicago, 2018
<https://journals.aom.org/doi/10.5465/AMBPP.2018.16790symposium>

R1 and R3 were published in prominent international journals with strong peer-review processes and editorial boards. R2 is a chapter in an influential volume edited by Edwin Locke and Gary Latham, the most eminent researchers in this field. R4 was presented at the leading and largest annual management academic conference, which uses extensive refereeing and is highly competitive. The quality of the research was acknowledged in two prestigious awards: US Academy of Management Most Innovative Contribution to Management Education, 2014; and British Psychological Society Division of Occupational Psychology Award for Academic Contribution to Practice, 2017.

4. Details of the impact (indicative maximum 750 words)

Travers and Loughborough have produced a TEDx video and an instructional video, which have received nearly 10,000 and more than 2,000 views respectively. These have represented a pathway to impact for some beneficiaries, but the main pathway is via Executive Education (EE) and other courses at Loughborough, where delegates are taught RGS, practise it and then – crucially – apply it in their workplaces.

- ***Improved interpersonal skills for more effective leadership***

RGS was a core element of Loughborough's EE programmes for around 500 delegates from eight corporate clients between 2014 and 2020. An independent researcher evaluated the impact of RGS on 103 delegates on accredited courses from 2014 to 2017 using a survey, interviews and content analysis of their coursework assignments [S1].

89% of survey respondents reported more confidence in setting appropriate goals; 85% in achieving them. Two thirds reported the biggest positive impact for their team was the “response to their leadership”, while the most frequently reported positive impact on an organisation level was a change in culture (43%). For example, a manager at Renault reported that RGS had led him to switch to a coaching style and that “during the first three weeks of this approach the overall engagement from the team increased... I also saw the sales rate from three individuals considerably increase” [S2]. Interviews with managers and colleagues corroborated RGS users' self-reports of impact on self and their teams [S1].

- ***Increased performance and personal growth of students and graduates***

Travers has used RGS as a core component of a final-year semester 1 undergraduate optional module, Advanced Interpersonal Skills (AIS), taken by over a thousand Loughborough business students during this REF period. The academic performance on compulsory modules of students who took AIS between 2014 and 2018 improved statistically significantly more between second year and semester 2 of final year than a matched sample of students who did not take AIS (mean mark up by 5.5% versus 2.2%) [S3]. One student reported: “I am genuinely a changed person in terms of my work ethic and ability. I can now work for hours at a time with no procrastination.” [S3]

Travers has received many emails – most of them unsolicited – from graduates who have drawn on RGS in their working lives [see S4 for a selection]. A team leader at a top accountancy firm (2014 graduate) wrote: “[RGS] is a tool that I have used in many forms... in many of the teams I have led since embarking on my career.” A chartered accountant, who graduated in 2015, wrote: “I use the skills and knowledge I learnt from RGS every day.”

The lead for the BSc Business Psychology programme at the University of Lincoln introduced RGS to a cohort of 44 students in October 2020. She reported: “The act of reflecting on past and current experiences helped students identify positive actions that they could take to support their learning.” The use of RGS at Lincoln will be expanded [S5].

- ***Improved safety and patient care at Leeds Teaching Hospital NHS Trust***

The Trust employs more than 18,000 staff and runs 7 hospitals. Selected medical and operational staff attended the Leadership in Healthcare EE course, led by Travers, between 2014 and 2016. Delegates were taught the RGS model and were asked to set a personal goal for their leadership development. Specific impact outcomes noted by the Trust's Manager of Organisational Learning [S6] included the following:

Improvement in asbestos safety: A Trust member was able to complete the specification of a new asbestos management contract, which included new mechanisms of control, improving on the ad-hoc arrangements previously employed. The Manager of Organisational Learning

stated: “RGS has enabled her to achieve a process that will free up capacity and allow managers to help themselves in this specialist area.” [S6]

Improved medical equipment safety protocol: A Trust member achieved changes concerning the safety of medical equipment, leading to sustainable improvements via staff members becoming more responsive to dealing with this issue [S6].

New arrangements for supporting deteriorating patients: A Trust member introduced a 24/7 service for junior doctors to assess deteriorating patients. The Manager of Organisational Learning stated: “[She] used RGS principles to help her achieve consensus on goals and to overcome barriers in a team that was initially extremely resistant to change. [Her] support service has... resulted in a 33% reduction in cardio arrest calls.” [S6]

• **Improved performance management among Building Societies Association (BSA) members**

A bespoke MSc in Strategic Leadership for Financial Mutuals employed Travers’ RGS model as the fundamental transfer-of-learning tool for their leader and manager delegates. The BSA’s CEO affirmed the positive impact on attendees, particularly with regard to manager performance skills and outcomes [S7]. Examples included the following:

Development of new appraisal framework: A BSA manager implemented change within the performance appraisal process in a building society. The BSA’s CEO commented: “RGS has been fundamental in their development of a standardised process that enables managers to appraise individuals more effectively... [and] the presentation and communication skills necessary to support take-up of the improved approach.” [S7]

Improvement in delivering feedback for performance management: A BSA manager set a goal to improve this aspect of leadership. The BSA CEO reported: “They used RGS principles to help them communicate developmental aspects with their team (e.g. use of the MBTI, goal setting, being prepared for developmental reviews)... [They were] also able to share this new learning with another colleague.” [S7]

• **Improved safety culture at NMCN**

NMCN is the UK’s main contractor in water and built environment, with turnover of GBP200 million per annum and more than 1,100 employees. Identifying a need for improved safety communications and behaviours, it has used RGS as the transfer-of-learning framework for approximately 180 personnel across job levels and sectors since 2018 [S8]. This has led to greater observed efficiency, safer behaviours and a stronger safety culture.

The company’s Health and Safety Training Manager stated: “A general communications skills course could have been delivered without the RGS element, but it would not have had the same effect... Senior members have reported an observed change in attitude from those having attended the course.” A Director of Operations reported: “This course has managed to engage our teams at all levels, in a way other courses haven’t... It also has encouraged those at the senior leadership level to reflect on their own behaviours.” [S8]

• **Positive goal-directed behaviour change among software developers**

A researcher at the University of Zurich used RGS with 52 software developers from four countries and 10 companies, including Microsoft. The aim was to develop their skills in identifying and actioning goals. He reports: “As a result of our RGS approach... 81% were helped to identify concrete goals, 83% were helped to generate actionable strategies and 80% stated RGS motivated productive behaviour change.” [S9]

• **Improved team performance at Eurofins**

Eurofins is an international group of laboratories headquartered in Luxembourg, providing testing and support services to various industries and to governments. A need was identified to enhance the goal setting skills and resilience of the business's upcoming leaders, and Travers' RGS model was used in the company's Future Leaders programme run by Loughborough. Eurofins' Human Resources Director corroborated the positive impact of RGS on attendees [S10], including the following examples:

Reducing task backlog and improving turnaround in the Quality Assurance (QA) team: A manager used RGS to tackle a deteriorating situation at a US site where work was piling up and team morale was low. In May 2020 a 6-month backlog was tackled, and by December there were no active tasks on record. QA tasks that previously took 2 weeks were accomplished within 3 to 5 days. Eurofins' Human Resources Director said: "RGS was fundamental to the success of this process, partly because it helped [the manager] view what had been his home site from a more corporate perspective." [S10]

Improving sales figures and team functioning: A manager in the US who felt overwhelmed by her workload used RGS to set goals around delegation in order to develop her team and reduce the demands on her. Her team engaged in more independent problem-solving, and she achieved around 115% of her annual sales target (USD21.27 million [GBP15.41 million as at January 2021]) even before year end. Eurofins' Human Resources Director said: "Before using RGS she had never reached 100% of the sales target in the type of role she currently occupies. She is in no doubt that RGS was fundamental in achieving these increases in performance and management design changes." [S10]

5. Sources to corroborate the impact (indicative maximum of 10 references)

S1 Summary and analysis of RGS survey, interviews and coursework assignment data from EE students and corroborating managers, August 2017 (raw data available if required)

S2 Testimonial from General Sales Manager, Renault, October 2017

S3 *Exploring the Impact of a Reflective Goal Setting Quasi-Intervention on Academic Growth and Performance*, Travers, C, and Cheyne, A, 2020 (working paper – submitted for publication)

S4 Compilation of email testimonials from RGS-trained undergraduates and graduates

S5 Testimonial from Business Psychology course leader, University of Lincoln, January 2021

S6 Testimonial from Business Manager, Organisational Learning Department, Leeds Teaching Hospital Trust, plus corroborating Leadership in Healthcare interviews, June 2020

S7 Testimonial from CEO, Building Societies Association, July 2020

S8 Testimonials from Health and Safety Training Manager and organisational leaders, NMCN Plc, April 2020

S9 Testimonial from researcher, University of Zurich, January 2020

S10 Testimonial from Human Resources Director, Eurofins Selcia Ltd and Eurofins Agrosience Services Europe, January 2021